



## 2010-2011 Chapter History Report

September, 2011

The Southern Wisconsin Chapter of the Association of Government Accountants earned gold status for the 2010-2011 program year. We had a wide variety of educational events and community service opportunities. We were able to offer a total of 1,367 CPE hours during the program year. Anyone attending all sessions could earn 16 CPE for the year.

### 1. Training Events Held – Total CPE Offered: 10 Hours

**May 10, 2011:** AGA Annual Spring Symposium at University of Wisconsin  
Topics – Various accounting/auditing/development topics (listed behind speaker below)  
Speakers:

- **GASB Updates and an Overview of Suggested Guidelines for Performance Management**, Lisa Parker, CPA, Project Manager, Governmental Accounting Standards Board
- **iThink: Real Life ‘Apps’ for Thinking Caps**, Ann Mancl, Instructor, Accent Business Communications and UW-Whitewater
- **Federal, State, and Local Impacts of ARRA Grants**, Lisa Casias, CPA Deputy CFO, U.S. Dept. of Commerce; AGA National President
- **Vision 2020: A Model Wisconsin Economy**, Tom Still, President, Wisconsin Technology Council & Wisconsin Innovation Network
- **The Wisconsin Budget Process**, David Canon, Ph.D., Professor, UW-Madison

Location – UW Memorial Union, Madison, WI

CPE’s Offered – 7 hours

Attendance: 155

#### **April 26, 2011: Making Internal Controls Work in Your Organization - CD Audio Conference**

AGA, in conjunction with the National Association of State Auditors, Comptrollers and Treasurers (NASACT) and the Association of Local Government Auditors (ALGA), is pleased to announce a new and increasingly important topic to our audio conference schedule--making internal controls work by considering risks to the organization and building certain procedures into daily behavior.

This program will show participants how to:

- Design and implement effective internal controls
- Match organization risks to internal control procedures
- Build strong soft control procedures into daily behaviors

The presenter will cover the following areas:

- Introduction to business risk management and internal controls
- Internal control concepts
- Example business risk models and control matrices
- Organization governance, oversight and related controls
- The COSO Control Framework and similar models
- Example control documentation
- Why controls fail, and what to do about it
- Preventive controls versus detective controls

- Case studies and examples

To share his expertise in internal controls, fraud and risk management is John J. Hall, CPA, a professional speaker, seminar instructor and business consultant. He has 30-plus years of business experience in public accounting, multinational corporations and as a business owner and operator. His presentations stress active participant interaction, the development of high impact "how to" actions and solutions, and enhanced business and interpersonal skills for all involved.

**Learning Objectives:** To learn how to make internal controls work in your organization

**Program Level:** Intermediate

**Advance Prep:** None required

**Field of Study:** Auditing

The CD playback includes live discussion moderated by Ann Marie Anderson, CPA, from WI Department of Health Services

**Ann Marie Anderson, CPA**, is the lead auditor for Single Audit at the Wisconsin Department of Health Services. She is responsible for developing audit policy for sub-recipient and provider agencies, reviewing and acting on their audit reports, and providing technical assistance to agencies and their auditors.

Location – WI Dept of Revenue conference room

CPE's Offered – 3 hours

Attendance: 21

## 2. **Monthly Chapter Luncheon Meetings**– 1 CPE offered for each luncheon except January Tax Update – 6 CPE

- September 23, 2010 – Role of the Wisconsin Government Accountability Board, Tom Winkler, Government Accountability Board, (28 attended)
- October 27, 2010 – 26 Years in the Legislature – The Changes I've Seen, Representative Spencer Black (D-Madison, WI) (28 attended)
- November 18, 2010 – Henry Vilas Zoo-Open Every Day of the Year for Free-Financial Challenges, James Hubing, Director, Henry Vilas Zoo (25 attended)
- January 27, 2011 – Annual Tax Update, Mardee L. Blattner, CPA, MST, Manager, Baker Tilly Virchow Krause & Company (37 attended)
- February 24, 2011 – FBI Perspective on Detecting and Pursing Fraud , Neil Purtell, Retired FBI Supervisory Special Agent (64 attended)
- March 31, 2011 – The American Red Cross Serving Our Community: Down the Street, Across the Country and Around the World, Tom Mooney, CEO, American Red Cross, Madison Chapter (22 attended)

## 3. **Membership:**

We offer a free lunch meeting to all new members to encourage participation. New members are announced and welcomed at the monthly lunch meetings. Members who attend 3 training sessions from September through February receive a free lunch coupon to use for a lunch in March, April, or May.

## 4. **Community Service:**

Our chapter held a food drive at the September meeting. In October, we participated in the Passionately Pink for the Cure program to raise funds for breast cancer awareness. We raised over \$100. Our chapter conducted a food drive and cash donation collection at the November and January monthly luncheons. The March lunch featured the American Red Cross, so donations were collected at the door, totaling \$122. Two members participated in the Volunteer Income Tax Assistance Program, totaling over 100 hours. The chapter had a team participate in the MS Walk on May 1, 2011. Our team of 3 included 1 member and 2 non-members. We raised over \$300 in donations, including a chapter \$50 donation noted below.

The chapter made the following cash donations during the program year: \$75 to the American Red Cross, \$300 to the Second Harvest Food Bank (plus \$45 from chapter members), and \$50 to the MS Walk.

#### **5. CGFM Activities:**

We published articles in each newsletter related to the certification and offered reimbursement to the first 4 people to pass the exam. This year, we had two members start the certification process and 1 passed 1 exam part. We were once again able to get a Governor's Declaration that March was CGFM month. We received a signed certificate from Scott Walker, Governor, State of Wisconsin. This year we were also able to get a certificate from the Mayor of Madison. The two proclamations were displayed and highlighted at the March 31 lunch meeting and May 10 Symposium. CGFM holders who came to the March lunch received a free lunch. At our March 31 luncheon and the May 10 Symposium, all CGFM holders received a special CGFM sticker for their name badge to highlight their professional achievement.

#### **6. Early Career Activities**

We tried to target early career people with the membership rebate offer. We invited some early career members to join the board.

#### **7. Awards**

At our May 10 symposium training, we presented Trudy Givens with a certificate of achievement for winning the 2010 National SAVE Award (Securing Americans' Value and Efficiency). Ms. Givens attended the conference to accept. [Thousands of Federal employees submitted their ideas to streamline government and save your tax dollars. Thousands of citizens voted for four finalists. Out of more than 18,000 ideas, all of which were read and helped inform your government, Trudy's idea earned her an opportunity to meet the President and discuss her idea.]

The Chapter won first place in the Newsletter competition. After years of making changes and adjustments to the monthly newsletter, editor Lillian Radivojevich finally placed in the top spot. She was unable to attend the PDC, so a plaque presentation will take place in the fall of the year at a chapter lunch meeting.

The Chapter earned the Gold level under the Chapter Recognition Program and the Chapter President was able to attend the PDC and accept the award.